



OFFICE of EDUCATION INNOVATION

MID-CHARTER REVIEW

Excel Center - Marion County

2013 - 2014

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Summary of Mid-Charter Review Ratings	
Elementary/Middle School Core Question 1: Is the educational program a success?	
1.1. Is the school's academic performance meeting state expectation, as measured by Indiana's accountability system? *Previously: 1.1. Is the school making adequate yearly academic progress, as measure by the Indiana Department of Education's system of accountability?	Not evaluated
1.2. Are students making sufficient and adequate gains, as measured by the Indiana Growth Model? *Previously: 1.2. Are students making substantial and adequate gains over time, as measured using value-added analysis?	Not evaluated
1.3. Is the school preparing students to graduate from high school on time, and preparing those students who have not graduated on time to graduate within 5 years, as measured by Indiana's cohort graduation rate? *This indicator is new and was only assessed in the 2013-2014 school year.	Meeting standard
1.4. Is the school providing an equitable education to students of all races and socioeconomic backgrounds? *This indicator is new and was only assessed in the 2013-2014 school year.	Meeting standard
1.5. Is the school's attendance rate strong?	Not applicable
1.6. Is the school preparing students for college and careers? *This indicator is new and was only assessed in the 2013-2014 school year.	Exceeding standard
1.7. Is the school meeting its school-specific educational goals? *Previously classified as 1.4.	Exceeding standard
Core Question 2: Is the organization in sound fiscal health?	
Financial Evaluation from 2010-2012	
2.1 Is the school in sound fiscal health?	Meeting standard
Financial Evaluation from 2012-present	
2.1. Short Term Health: Does the school demonstrate the ability to pay its obligations in the next 12 months?	Exceeding standard
2.2. Long Term Health: Does the organization demonstrate long term financial health?	Exceeding standard
2.3. Does the organization demonstrate it has adequate financial management and systems?	Meeting standard
Core Question 3: Is the organization effective and well-run?	
3.1. Is the school leader strong in his or her academic and organizational leadership? *Previously classified as 2.5.	Meeting standard
3.2. Does the school satisfactorily comply with all its organizational structure and governance obligations? *Previously classified as 3.1.	Meeting standard
3.3. Is the school's board active and knowledgeable, and does it abide by appropriate policies, systems, and processes in its oversight? *Previously classified as 2.3.	Meeting standard

3.4. Does the school's board work to foster a school environment that is viable and effective? *This indicator is new and was only assessed in the 2013-2014 school year.	Meeting standard
3.5. Does the school comply with applicable laws, regulations, and provisions of the charter agreement relating to the safety and security of the facility? *Previously classified as 3.2.	Meeting standard
3.6. Is the school meeting its school-specific non-academic goals? *Previously classified as 2.6.	Not evaluated
Indicators included in the previous framework, but not assessed with the 2013-2014 framework.	
2.4. Is there a high level of parent satisfaction with the school?	Not evaluated
3.3. Has the school implemented a fair and appropriate pupil enrollment process?	Meeting standard
Core Question 4: Is the school providing the appropriate conditions for success?	
4.1. Does the school have a high-quality curriculum and supporting materials for each grade?	Meeting standard
4.2. Are the teaching processes (pedagogies) consistent with the school's mission?	Approaching standard
4.3. For secondary students, does the school provide sufficient guidance on and support and preparation for post-secondary options?	Meeting standard
4.4. Does the school effectively use learning standards and assessments to inform and improve instruction?	Meeting standard
4.5. Has the school developed adequate human resource systems and deployed its staff effectively?	Approaching standard
4.6. Is the school's mission clearly understood by all stakeholders?	Meeting standard
4.7. Is the school climate conducive to student and staff success?	Meeting standard
4.8. Is ongoing communication with students and parents clear and helpful?	Not applicable
4.9. Is the school fulfilling its legal obligations related to access and services to students with special needs?	Meeting standard
4.10. Is the school fulfilling its legal obligations related to access and services to students with limited English proficiency?	Meeting standard

Summary of Historical Annual Performance Review Ratings					
Core Question 1: Is the educational program a success?	2010-11	2011-12	2012-13	2013-14	FYCR
1.1. Is the school’s academic performance meeting state expectation, as measured by Indiana’s accountability system?	Not Evaluated				NA
1.2. Are students making sufficient and adequate gains, as measured by the Indiana Growth Model?	Not Applicable				NA
1.3. Is the school preparing students to graduate from high school within the time frame established upon enrollment, as measured by the average number of credits earned per term?	Not Evaluated			MS	MS
1.4. Is the school providing an equitable education to students of all races and socioeconomic backgrounds?	Not Evaluated			MS	MS
1.5. Is the school’s attendance rate strong?	Not Applicable				NA
1.6. Is the school preparing students for college and careers, or transition success?	Not Evaluated			ES	ES
1.7. Is the school meeting its school-specific educational goals?	Not Evaluated			ES	ES
Core Question 2: Is the organization in sound fiscal health?					
Financial Evaluation from 2010-2012	2010-11	2011-12	2012-13	2013-14	FYCR
2.1 Is the school in sound fiscal health?	MS	MS	Not Evaluated		MS
Financial Evaluation from 2012-present	2010-11	2011-12	2012-13	2013-14	FYCR
2.1. Short Term Health: Does the school demonstrate the ability to pay its obligations in the next 12 months?	Not Evaluated		ES	ES	ES
2.2. Long Term Health: Does the organization demonstrate long term financial health?	Not Evaluated		ES	ES	ES
2.3. Does the organization demonstrate it has adequate financial management and systems?	Not Evaluated		AS	MS	MS
Core Question 3: Is the school meeting its operations and access obligations?	2010-11	2011-12	2012-13	2013-14	FYCR
3.1. Is the school leader strong in his or her academic and organizational leadership?	MS	MS	MS	MS	MS
3.2. Does the school satisfactorily comply with all its organizational structure and governance obligations?	MS	MS	MS	MS	
3.3. Is the school’s board active and knowledgeable, and does it abide by appropriate policies, systems, and processes in its oversight?	ES	ES	MS	MS	

3.4. Does the school's board work to foster a school environment that is viable and effective?	Not Evaluated				MS	MS
3.5. Does the school comply with applicable laws, regulations, and provisions of the charter agreement relating to the safety and security of the facility?	MS	MS	MS	MS	MS	MS
3.6. Is the school meeting its school-specific non-academic goals?	Not Evaluated					NA
Indicators included in the previous framework, but not assessed with the 2013-2014 framework.	2010-11	2011-12	2012-13	2013-14		FYCR
2.4. Is there a high level of parent satisfaction with the school?	NA	NA	NA	NA		NA
3.3. Has the school implemented a fair and appropriate pupil enrollment process?	MS	MS	MS	NA		MS
Core Question 4: Is the school providing the appropriate conditions for success?						FYCR
4.1. Does the school have a high-quality curriculum and supporting materials for each grade?						MS
4.2. Are the teaching processes (pedagogies) consistent with the school's mission?						AS
4.3. For secondary students, does the school provide sufficient guidance on and support and preparation for post-secondary options?						MS
4.4. Does the school effectively use learning standards and assessments to inform and improve instruction?						MS
4.5. Has the school developed adequate human resource systems and deployed its staff effectively?						AS
4.6. Is the school's mission clearly understood by all stakeholders?						MS
4.7. Is the school climate conducive to student and staff success?						MS
4.8. Is ongoing communication with students and parents clear and helpful?						NA
4.9. Is the school fulfilling its legal obligations related to access and services to students with special needs?						MS
4.10. Is the school fulfilling its legal obligations related to access and services to students with limited English proficiency?						MS

Core Question 1: Is the educational program a success?

The Academic Performance Framework, outlined in Core Question 1, gauges the academic success of schools in serving their target populations and closing the achievement gap in Indianapolis. Core Question 1 consists of seven indicators designed to measure schools on how well their students perform and grow on standardized testing measures, attendance, and school-specific measures.

Due to the unique nature of the student population served by Adult High Schools, the regular metrics for high schools under the OEI performance framework does not provide an accurate picture of school performance. In 2013, the Office of Education Innovation developed a framework specific to Adult High Schools. Because 2013-14 is the first academic year in which adult high schools were assessed under the alternate performance framework, no historical ratings are available, and the school's mid-charter review is based on 2013-14 data.

1.1. Is the school's academic performance meeting state expectations, as measured by Indiana's accountability system?					
Indicator Targets	Does not meet standard	School has not met standard the last two years.			
	Approaching standard	School has approached standard the last two years.			
	Meets standard	School has met standard the last two years.			
	Exceeds standard	School has exceeded standard the last two years.			
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	Not Evaluated	Not Evaluated	Not Evaluated	Not Evaluated	Not Evaluated

The Excel Center for Adult Learners was not evaluated under an alternate rule in the 2013-14 school year. A proposed alternate is currently in the rulemaking process. Therefore, the school was **not evaluated** on this indicator for the mid-charter review.

1.2. Are students making substantial and adequate gains over time, as measured by the Indiana Growth Model					
Indicator Targets	<i>Only applicable to schools serving students in any one of, or combination of, grades 4-8.</i>				
	Does not meet standard	Results from the Indiana Growth Model indicate that less than 60.0% of students are making sufficient and adequate gains ('typical' or 'high' growth).			
	Approaching standard	Results from the Indiana Growth Model indicate that 60.0-69.9% of students are making sufficient and adequate gains ('typical' or 'high' growth).			
	Meets standard	Results from the Indiana Growth Model indicate that 70.0-79.9% of students are making sufficient and adequate gains ('typical' or 'high' growth).			
	Exceeds standard	Results from the Indiana Growth Model indicate that at least 80.0% of students are making sufficient and adequate gains ('typical' or 'high' growth).			
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	Indicator 1.2 does not apply to Adult High Schools.				

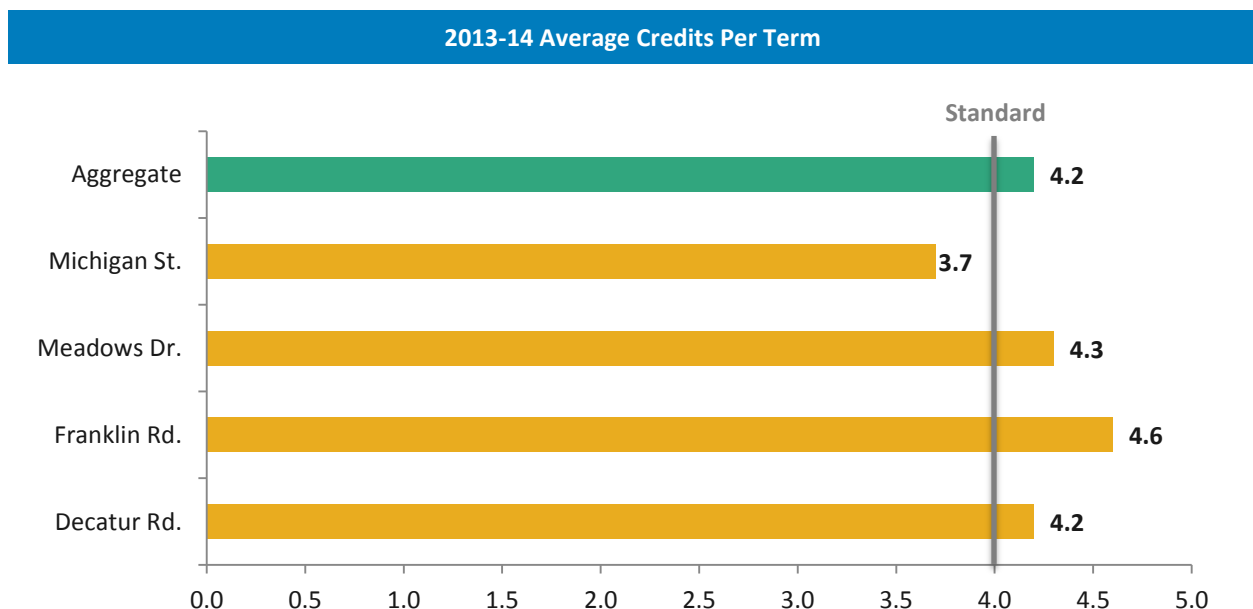
The Indiana Growth Model does not currently include growth measures for high school assessments. Therefore, Adult High Schools do not receive a rating on this indicator.

1.3. Is the school preparing students to graduate from high school within the time frame established upon enrollment, as measured by the average number of credits earned per term?					
Indicator Targets	Does not meet standard	Students earn an average of less than 3 credits per term or semester.			
	Approaching standard	Students earn an average of 3 credits per term or semester.			
	Meets standard	Students earn an average of 4 credits per term or semester.			
	Exceeds standard	Students earn an average of 5 credits or more per term or semester.			
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	Not Evaluated			MS	MS

Traditional high schools in Indiana are held accountable to a four-year cohort graduation rate measured from a point when students first enter high school. Because many Adult High School students do not have an assigned cohort, or are beyond their cohort, a traditional graduation rate is not a feasible measure.

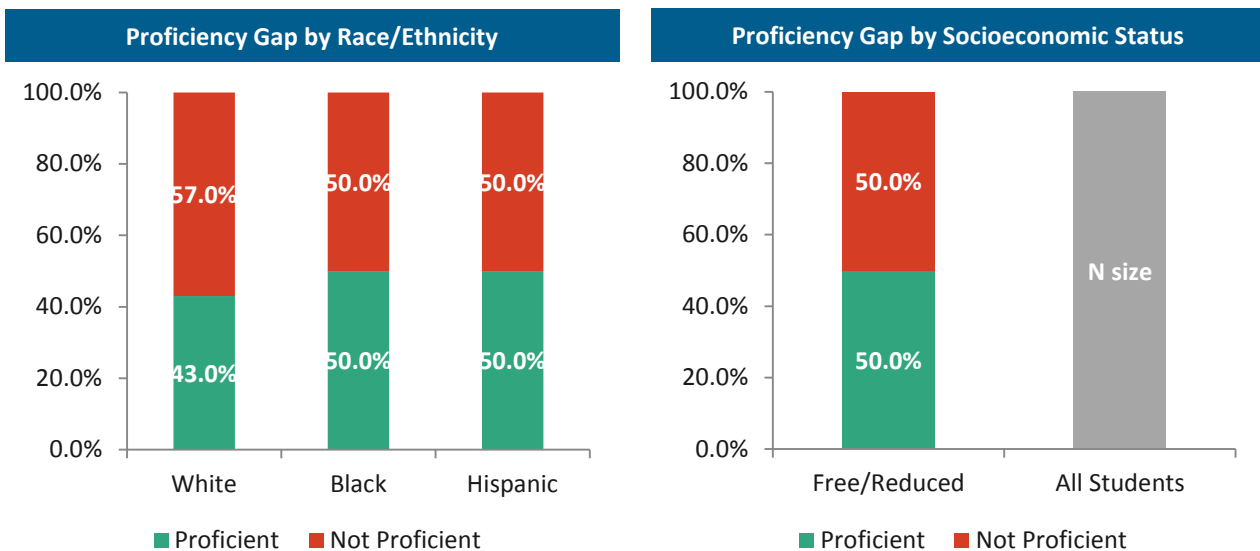
In place of a graduation rate, OEI examines students' progress towards graduation by looking at the average number of course credits earned per term or semester. In the 2013-14 school year, students across the Excel Center-Marion County earned an average of 4.2 credits per term. Because this is the only year data is available, the school's mid-charter rating is based on 2013-14 results.

From this data, the school earned a **Meeting Standard** for this indicator on the OEI performance framework.



1.4. Is the school providing an equitable education for students of all races and socioeconomic backgrounds?					
Indicator Targets	Does not meet standard	School has more than 15% difference in the percentage of students passing standardized assessments amongst races and socioeconomic statuses.			
	Approaching standard	School has no more than 15% difference in the percentage of students passing standardized assessments amongst races and socioeconomic statuses.			
	Meets standard	School has no more than 10% difference in the percentage of students passing standardized assessments amongst races and socioeconomic statuses.			
	Exceeds standard	School has more than 5% difference in the percentage of students passing standardized assessments amongst races and socioeconomic statuses.			
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	Not Evaluated			MS	MS

Each year, the Indiana Department of Education reports student results disaggregated by race/ethnicity groups and socioeconomic status. Disaggregated performance for the Excel Center-Marion County is captured below.



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In order to report a proficiency level, a subgroup must have at least 30 students. While the individual Excel Center campuses did not have large enough subgroups to receive a rating on this indicator, the combined subgroups for the entire charter did show a gap in Race/Ethnicity subgroups of 7%. Specifically, students in the White subgroup showed a passing rate of 43%, while both the Black and Hispanic subgroups had a passing rate of 50%.

The combined socioeconomic subgroups did not meet the required N size of 30 students to examine a gap. The graph above and on the right thus shows the performance of the largest subgroup of students, those who qualify for free/reduced lunch.

Because 2013-14 is the only academic year with data available, the school's mid-charter rating is based on that data. Therefore, the school receives a Meeting Standard on the mid-charter review.

1.5. Is the school's attendance rate strong?					
Indicator Targets	Does not meet standard		School's attendance rate is less than 95.0%.		
	Meets standard		School's attendance rate is greater than or equal to 95.0%.		
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	Indicator 1.5 does not apply to Adult High Schools.				

Due to the unique nature of Adult High Schools' student population, attendance is not an appropriate measure of success.

1.6. Is the school preparing students for college and careers?					
Indicator Targets	Does not meet standard		Less than 30.0% of graduates meet at least one of the following: 1) received a '3' or better on an AP exam; 2) received a '4' or better on an IB exam; 3) received transcribed post-secondary credit from an approved course; or 4) received an industry certification from an approved list.		
	Approaching standard		30.0 – 39.9% of graduates meet at least one of the following: 1) received a '3' or better on an AP exam; 2) received a '4' or better on an IB exam; 3) received transcribed post-secondary credit from an approved course; or 4) received an industry certification from an approved list.		
	Meets standard		40.0 – 49.9% of graduates meet at least one of the following: 1) received a '3' or better on an AP exam; 2) received a '4' or better on an IB exam; 3) received transcribed post-secondary credit from an approved course; or 4) received an industry certification from an approved list.		
	Exceeds standard		At least 50.0% of graduates meet at least one of the following: 1) received a '3' or better on an AP exam; 2) received a '4' or better on an IB exam; 3) received transcribed post-secondary credit from an approved course; or 4) received an industry certification from an approved list.		
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	Not Evaluated			ES	ES

The Indiana State Board of Education has established criteria for determining whether or not a high school graduate has not only met graduation requirements, but is also college- or career-ready. In order to be deemed college- or career-ready, a student must pass an AP or IB exam, earn dual credit from an approved list of courses, or receive an industry certification from an approved list.

Of the Excel Center-Marion County's 2013 graduates, 74% were deemed college- or career-ready by the Indiana Department of Education. Because 2013-14 is the only academic year with data available, the school's mid-charter rating is based on that data. Therefore, the school receives an Exceeding Standard on the mid-charter review.

1.7. Is the school meeting its school-specific educational goals?					
Indicator Targets	Does not meet standard	School does not meet standard on either school-specific educational goal.			
	Approaching standard	School is 1) approaching standard on one school-specific educational goal, while not meeting standard on the second goal, 2) approaching standard on both school-specific educational goals, or 3) meeting standard on one school-specific educational goal, while approaching standard on the second goal.			
	Meets standard	School is 1) meeting standard on both school-specific educational goals, or 2) meeting standard on one school-specific educational goal while exceeding standard on the second goal.			
	Exceeds standard	School is exceeding standard on both school-specific educational goals.			
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	Not Evaluated			ES	ES

Each year, Mayor-sponsored charter schools set two educational goals that are aligned to or support the school's unique mission, shown below. All data points for school-specific goals are self-reported by the individual school.

In 2013-14, The Excel Center-Marion County set its first goal around ensuring that students passed certification exams. The school reported that 77% of students across campuses achieved a 65% pass rate on certification exams, and therefore **exceeds standard** for its first goal.

The Excel Center set its second goal around ensuring that graduates had either passed the ECA/GQE, or earned an industry certification. The school reported that 100% of graduates across campuses met either criteria, and therefore **exceeds standard** for its second goal.

School Year	School-Specific Goals	Result	Rating
2013-2014	Excel Center students will achieve a 65% pass rate on certification exams.	77%	ES
	100% of graduates will have passed the ECA/GQE or will have earned an industry recognized certification.	100%	ES

Overall, The Excel Center receives an **Exceeding Standard** on the OEI performance framework.

Core Question 2: Is the organization in sound fiscal health?

The Financial Performance Framework, outlined in Core Question 2, gauges both near term financial health and longer term financial sustainability while accounting for key financial reporting requirements. It is worth noting that the Office of Education Innovation reorganized the performance framework in 2012, and some indicators may not have four years of complete data, or may be based on more than one measure of data.

Financial Evaluation from 2010-2012

2.1. Is the school in sound financial health?					
Indicator Targets	Does not meet standard	The school presents concerns in three or more of the following areas: a) its state financial audits (e.g., presence of “significant findings”); b) its financial staffing and systems; c) its success in achieving a balanced budget over the past three years; d) the adequacy of its projections of revenues and expenses for the next three years; e) its fulfillment of financial reporting requirements under Sections 10 and 17 of the charter agreement.			
	Approaching standard	The school presents significant concerns in one or two of the following areas: a) its state financial audits (e.g., presence of “significant findings”); b) its financial staffing and systems; c) its success in achieving a balanced budget over the past three years; d) the adequacy of its projections of revenues and expenses for the next three years; e) its fulfillment of financial reporting requirements under Sections 10 and 17 of the charter agreement.			
	Meets standard	The school presents significant concerns in no more than one of the following areas: a) its state financial audits (e.g., presence of “significant findings”); b) its financial staffing and systems; c) its success in achieving a balanced budget over the past three years; d) the adequacy of its projections of revenues and expenses for the next three years; e) its fulfillment of financial reporting requirements under Sections 10 and 17 of the charter agreement. In addition, if the school presents significant concerns in one area, it has a credible plan for addressing the concern that has been			
	Exceeds standard	The school demonstrates satisfactory performance in all of the areas listed in previous levels.			
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	MS	MS	Not Evaluated		MS

Excel Center-Marion County achieved a mid-charter rating of **meets standard** for the version of Core Question 2.1 used by the Office of Education Innovation for the 2010-11 and 2011-12 school years.

In 2010-2011, Excel Center-Marion County **met standard** for Core Question 2.1. The school had adequate staffing and financial systems in place. It also regularly met reporting deadlines. The school had to rely on approximately \$239K in cash reserves to achieve a balanced budget that year.

The school continued its acceptable performance in the 2011-12 school year and **met standard**. Greenwalt CPAs conducted Excel Center-Marion County’s audit and found that the school had no material weaknesses or

significant deficiencies. The school continued to have adequate financial staffing and systems, achieved a balanced budget, had sufficient three-year budget projections, and fulfilled its financial reporting requirements.

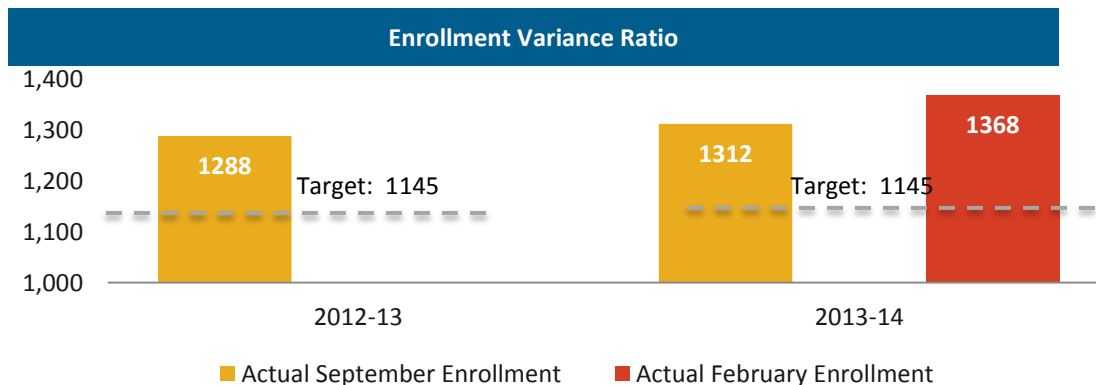
Overall, due to its sustained performance and financial health from 2010 to 2012, Excel Center-Marion County receives a **Meeting Standard** on its mid-charter review.

Financial Evaluation from 2012-Present

2.1. Short-term Health: Does the school demonstrate the ability to pay its obligations in the next 12 months?								
Indicator Targets	Does not meet standard		The school does not meet standard on 2 or more of the five sub-indicators shown below.					
	Approaching standard		The school approaches standard for all 5 sub-indicators shown below, OR meet standard on 3 sub-indicators, while approaching on the remaining 2 OR meets standard on 4 sub-indicators, while not meeting standard for the final sub-indicator.					
	Meets standard		The school meets standard for 4 sub-indicators shown below, while approaching standard on the final sub-indicator.					
	Exceeds standard		The school meets standard for all 5 sub-indicators.					
School Rating	2010-11		2011-12	2012-13	2013-14	Mid-Charter Rating		
	Not Evaluated			ES	ES	ES		
Sub-indicator Ratings	Sub-	Sub-indicator targets			12-13		13-14	
	Enrollment Ratio	DNMS	Enrollment ratio is less than or equal to 89%		114%	MS	115%	MS
		AS	Enrollment ratio is between 90 – 98%					
		MS	Enrollment ratio equals or exceeds 99%					
	February Enrollment Variance	DNMS	Enrollment ratio is less than or equal to 89%		N/A	N/A	104%	MS
		AS	Enrollment ratio is between 90 – 95%					
		MS	Enrollment ratio equals or exceeds 95%					
	Current Ratio	DNMS	Current ratio is less than or equal to 1.0		4.29	MS	4.38	MS
		AS	Current ratio is between 1.0 – 1.1					
		MS	Current ratio equals or exceeds 1.1					
	Days Cash on Hand	DNMS	Days cash on hand is less than or equal to 30		54	MS	95	MS
		AS	Days cash on hand is between 30-45					
		MS	Days cash on hand equals or exceeds 45					
	Debt Default	DNMS	Default or delinquent payments identified		MS	MS	MS	MS
		MS	Not in default or delinquent					

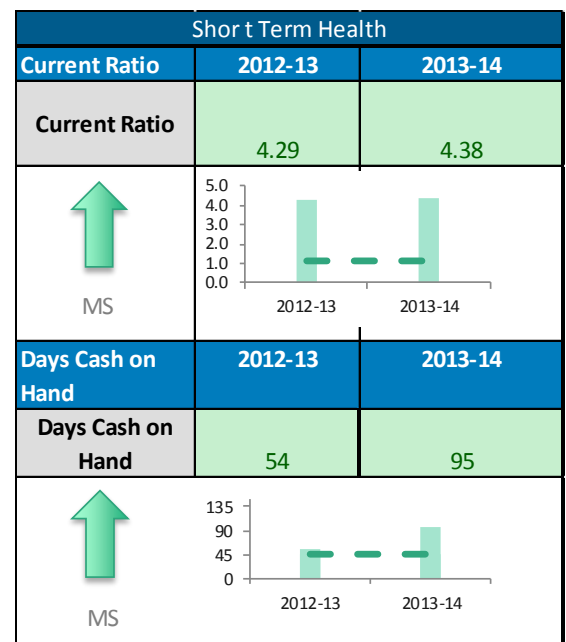
Beginning in the 2012-13 school year, the Office of Education Innovation added and revised several key indicators of its financial performance framework. The enrollment ratio tells authorizers whether or not the school is meeting its enrollment projections in its charter. Each charter school commits in its charter contract to offering the community a certain number of seats to educate students. It is important that each school is fulfilling its commitment to the community by working diligently to ensure that families and children seeking educational opportunities are aware of the school. Additionally, charter schools, like all public schools, receive state funding based on their enrollment. This means that enrollment is an important factor in the fiscal health of charter schools.

Based on data from the September 2012 count day, Excel Center-Marion County's enrollment exceeded the enrollment targets stated in its charter agreement, meaning that, for school year 2012-13, the school was generating sufficient revenue to fund ongoing operations. As a result, the school **met standard** for this sub-indicator. In school year 2013-14, the school met its enrollment targets for the September count day and thus **met standard** for this sub-indicator. In the same year, OEI also looked at the change (variance) between fall and February enrollment. Since the February enrollment influences funding for coming year, schools need to retain enough students between September and February to be able to serve the same number of students the following year. In the 2013-2014 school year, Excel Center-Marion County's enrollment increased and the school **met standard** for this sub-indicator. The school's performance for the February count day is listed as "N/A" because the state did not perform a February count prior to the 2013-14 school year.



Between 2012 and 2014, Excel Center-Marion County had more current assets than current liabilities (those due in the next 12 months). As a result, the school **met standard** for the current ratio sub-indicator for both years. The school ended the year with 54 days cash on hand in 2013, and 95 days cash on hand in 2014. This means that if payments to the school had stopped or been delayed post June 30 of each respective year, the school would have been able to operate for 54 more days after June 30, 2013 and 95 days after June 30, 2014. Based on this data, the school **met standard** for this sub-indicator in both years. Finally, between 2012 and 2014, the school successfully met its debt obligations based on the information that the school's auditor provided. Furthermore, there were no negative communications from the school's lenders.

Since the school **exceeded standard** in both years, Excel Center-Marion County receives an **Exceeding Standard** for its mid-charter rating on the short-term financial health indicator.



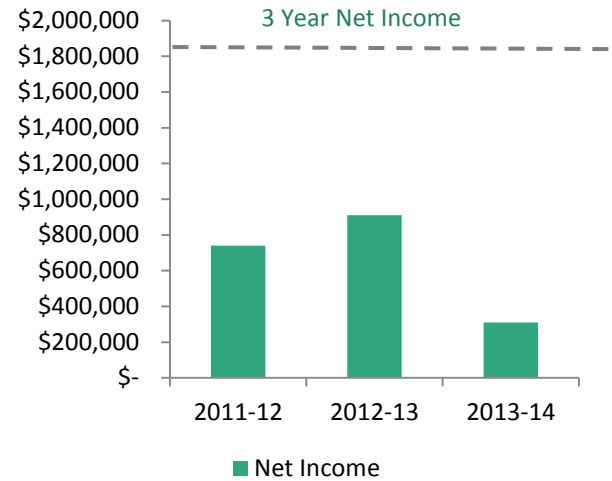
2.2. Long-term Health: Does the organization demonstrate long-term financial health?									
Indicator Targets	Does not meet standard		The school does not meet standard on any of the 3 sub-indicators OR meets standard on 1 sub-indicator but does not meet standard on the remaining 2.						
	Approaching standard		The school meets standard on 2 of the sub-indicators while not meeting on the third, OR approaches standard on all 3 sub-indicators.						
	Meets standard		The school meets standard on 2 of the sub-indicators and approaches standard on the third.						
	Exceeds standard		The school meets standard for all 3 sub-indicators.						
School Rating	2010-11		2011-12	2012-13	2013-14	Mid-Charter Rating			
	Not Evaluated			ES	ES	ES			
Sub-indicator Ratings	Sub-indicator		Sub-indicator targets			12-13		13-14	
	Aggregate Three-Year Net Income	DNMS	Aggregate 3-year net income is negative.			\$909,754 (Current Year)	MS	\$1,959,204 (3 Year Aggregate) \$309,977 (Current Year)	MS
		AS	Aggregate 3-year net income is positive, but most recent year is negative.						
		MS	Aggregate three year net income is positive, and most recent year is positive.						
	Debt to Asset Ratio	DNMS	Debt to Asset ratio equals or exceeds .95			0.13	MS	0.17	MS
		AS	Debt to Asset ratio is between .9 - .95						
		MS	Debt to Asset ratio is less than or equal to .9						
	Debt Service Coverage (DSC) Ratio	DNMS	DSC ratio is less than or equal to 1.05			N/A	N/A	N/A	N/A
		AS	DSC ratio is between 1.05-1.2						
		MS	DSC ratio equals or exceeds 1.2						


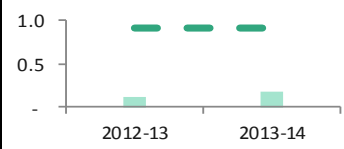
The Mayor's Office of Education Innovation introduced Core Question 2.2 in its current form in the 2012-13 school year. As such, it is only evaluated for the 2012-13 and 2013-14 school years for the purpose of the mid-charter review. This Core Questions evaluates each school's long term fiscal health with the understanding that a charter school, like any non-profit entity, can only operate for so long with year over year losses, extreme amounts of debt, or an inability to meet its debt obligations.

The Excel Center-Marion County **met standard** for the net income sub-indicator for school years ending 2013 and 2014. The school had a positive annual net income in each school year ending in 2012, 13, and 14, and has an aggregate 3-year net income of \$1,959,204. The graph to the right shows each year's income and the 3-year net income.

The framework also analyzes a school's debt to asset ratio because its long-term operations could be jeopardized if its debt repayment grows to be so sizeable that it decreases the amount funds available for programming. Excel Center-Marion County **met standard** on the debt to asset ratio sub-indicator for school years ending 2013 and 2014. The graph below shows that, in both years, the schools' total assets exceeded its total debts.

Three-Year Net Income



Long-Term Health		
Debt to Asset Ratio	2012-13	2013-14
Debt to Asset Ratio	0.13	0.17
 MS		

Finally, in the event that a school has capital leases or long-term maturities, the debt service coverage ratio is important in that it analyzes a school's ability to meet debt obligations in the coming year based on income generated in the current year. The school received a rating of "N/A" for this sub-indicator in both years because it had no long-term maturities or capital leases.

Based on its strong and stable performance, Excel Center-Marion County receives a mid-charter rating of **Exceeding Standard** for Core Question 2.2.

2.3. Does the organization demonstrate it has adequate financial management and systems?					
Indicator Targets	Does not meet standard		The school does not meet standard on 1 of the sub-indicators.		
	Approaching standard		The school meets standard on 1 sub-indicator, but approaches standard for the remaining sub-indicator.		
	Meets standard		The school meets standard on both sub-indicators.		
School Rating	2010-11	2011-12	2012-13	2013-14	Mid-Charter Rating
	Not available		AS	MS	MS
Sub-indicator Ratings	Sub-indicator	Sub-indicator targets		12-13	13-14
	Financial Audit	DNMS	The school receives an audit with multiple significant deficiencies, material weaknesses, or has an ongoing concern.	AS	MS
		AS	The school receives a clean audit opinion with few significant deficiencies noted, but no material weaknesses.		
		MS	The school receives a clean audit opinion.		
	Financial Reporting Requirements	DNMS	The school fails to satisfy financial reporting requirements.	MS	MS
		MS	The school satisfies all financial reporting requirements.		

Core question 2.3 ensures that schools have the proper internal controls and that schools are reporting financial data both to the state of Indiana and to the Office of Education Innovation in a timely manner.

In 2012-2013, Excel Center-Marion County **approached standard** for Core Question 2.3 because it **approached standard** on the financial audit sub-indicator. Although it received a clean audit, the audit did contain one significant deficiency. It is important to note that this significant deficiency did not impact the materiality of the financial statements. Page 17 of the school's audit states, "The Schedule of Expenditures or Federal Awards (SEFA) which was prepared by the client did not include the Community Based Job Training grant." As a result, the school originally submitted an incomplete SEFA. The school promised to put procedures in place to ensure that such an error does not occur again. The same year, Excel Center-Marion County **met standard** for its financial reporting requirements. The combination of these two ratings led to the school **approaching standard** for Core Question 2.3 for the 2012-2013 school year.

The school **met standard** for the 2013-14 school year. Its financial audit was clean and contained no significant deficiencies or material weaknesses. Additionally, it met all of the financial reporting requirements outlined in its charter.

As a result of its ratings for 2012-13 and 2013-14, the school receives a **Meeting Standard** for its mid-charter review for Core Question 2.3.

Core Question 3: Is the organization effective and well-run?

The Governance and Leadership Performance Framework, outlined in Core Question 3, gauges the academic and operational leadership of schools. Core Question 3 consists of five indicators designed to measure schools on how well their school administration and board of directors comply with the terms of their charter agreement, applicable laws, and authorizer expectations. It is worth noting that the framework was updated for the 2013-2014 school year. While some indicators were re-organized into Core Question 3, two are new, and two have since been removed.

3.1. Is the school leader strong in his or her academic and organizational leadership?					
Indicator Targets	Does not meet standard	The school leader presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.			
	Approaching standard	The school leader presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.			
	Meets standard	The school leader complies with and presents no concerns in the sub-indicators below.			
	Exceeds standard	The school leader consistently and effectively complies with and presents no concerns in the sub-indicators below.			
Sub-indicators	Sub-indicators				
	Demonstration of sufficient academic and leadership experience				
	Leadership stability in key administrative positions				
	Communication with internal and external stakeholders				
	Clarity of roles among schools and staff				
	Engagement in a continuous process of improvement and establishment of systems for addressing areas of deficiency in a timely manner				
	Consistency in providing information to and consulting with the schools' board of directors				
3.1 Rating	2010-11	2011-12	2012-13	2013-14	Mid-Charter Rating
	MS	MS	MS	MS	MS

Since its opening in 2010, the Excel Center has rapidly grown to nine centers across the state of Indiana. In the first three years of the charter, the leadership team remained stable with the Excel Center employing an Executive Director and receiving support from the Chief Operating Officer (COO) of Goodwill Education Initiatives (GEI), the education branch of Goodwill Industries of Central Indiana (GICI). Both the Executive Director and COO demonstrated strong expertise and backgrounds in education and operations. Additionally, through the strong partnership with GICI, the centers received additional support and expertise in areas such as finances, operations, data, and academics.

With the growth of the network, the Excel Center expanded its leadership team during the 2013-2014 school year to manage school operations and provide support more effectively. A new Executive Director was hired to oversee the strategic planning, goal setting, and management of leaders at the school and regional level. Two Regional

Directors worked closely with the School Directors in data analysis, problem solving, and professional development. Further, each center's School Director managed the day-to-day operations of the school implemented network-wide initiatives. All of the leaders demonstrated sufficient academic and operational experience, with many of them having previously served as teachers at one of the Excel Center locations.

Since 2010, the Excel Center leadership has excelled in several areas. Roles, responsibilities, and expectations have been clearly delineated to allow for smooth systems, processes, and transitions when necessary. The Excel Center, through the support of GEI and GICI, has also established many meaningful community partnerships with local businesses, universities, and community organizations that provide services and support to the schools and students. Finally, all levels of leadership have demonstrated a dedication to continually improving network, school, and student performance. Leaders have reflected on several areas of school data, such as staffing, course offerings and curriculum, professional development, and student support systems to regularly inform day-to-day decisions. They have routinely considered the challenges that their students faced and how they could best support their efforts to receive a meaningful high school education. This effort is evidenced by the continuous increase in student performance, including ECA data, credits earned, graduation numbers, and those employed after graduation.

Overall, the school and network leadership have been consistently effective in their organizational and academic oversight and the school receives a [Meeting Standard](#) for this indicator.

3.2. Does the school satisfactorily comply with all its organizational structure and governance obligations?					
Indicator Targets	Does not meet standard	The school leader presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.			
	Approaching standard	The school leader presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.			
	Meets standard	The school leader complies with and presents no concerns in the sub-indicators below.			
	Exceeds standard	The school leader consistently and effectively complies with and presents no concerns in the sub-indicators below.			
Sub-indicators	Sub-indicators				
	Submission of all required compliance documentation in a timely manner as set forth by the Mayor’s Office, including but not limited to: meeting minutes and schedules, board member information, compliance reports and employee documentation				
	Compliance with the terms of its charter, including amendments, school policies and regulations, and applicable federal and state laws				
	Proactive and productive collaboration with its board and/or management organization (if applicable) in meeting governance obligations				
	Active participation in scheduled meetings with OEI, including the submission of required documentation by deadlines				
3.2 Rating	2010-11	2011-12	2012-13	2013-14	Mid-Charter Rating
	MS	MS	MS	MS	MS

Between 2010 and 2012, the Excel Center completed its organizational and governance obligations specified by the Mayor's Office (OEI) and the Indiana Department of Education in a timely manner. Documents and reports that were submitted to OEI were on time and accurate with no deficiencies noted. During the 2012-2013 school year and the first half of the 2013-2014 school year, there were several occasions when documents were submitted late and OEI had to work with the school to ensure proper submission. However, with the transition to a new Executive Director in 2013, compliance responsibilities were delegated to a Regional Manager, who was able to establish better systems and processes for submitting documentation. Since then, submission time has significantly improved.

The Excel Center has consistently maintained compliance with all material sections of its charter and has submitted amendments as necessary. The Executive Director, Regional Directors, and School Directors have been actively engaged in meetings with OEI and have maintained frequent communication with OEI between scheduled meetings. For these reasons, The Excel Center receives a [Meeting Standard](#) for compliance obligations.

3.3. Is the school's board active, knowledgeable, and does it abide by appropriate policies, systems, and processes in its oversight?					
Indicator Targets	Does not meet standard	The school leader presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.			
	Approaching standard	The school leader presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.			
	Meets standard	The school leader complies with and presents no concerns in the sub-indicators below.			
	Exceeds standard	The school leader consistently and effectively complies with and presents no concerns in the sub-indicators below.			
Sub-indicators	Sub-indicators				
	Timely communication of organizational, leadership, academic, fiscal, or facility deficiencies to the Mayor's Office; or when the school's management company (if applicable) fails to meet its obligations as set forth in the charter				
	Clear understanding of the mission and vision of the school				
	Adherence to board policies and procedures, including those established in the by-laws, and revision of policies and procedures, as necessary				
	Recruitment and selection of members that are knowledgeable, represent diverse skill sets, and act in the best interest of the school and establishment of systems for member orientation and training				
	Effective and transparent management of conflicts of interest				
	Collaboration with school leadership that is fair, timely, consistent, and transparent in handling complaints or concerns				
	Adherence to its charter agreement as it pertains to governance structure				
	Holding of all meetings in accordance with Indiana Open Door Law				
3.3 Rating	2010-11	2011-12	2012-13	2013-14	Mid-Charter Rating
	ES	ES	MS	MS	MS

Over the last four years, the board of directors for the Excel Center has consistently provided competent oversight for the schools. The board roster, remaining relatively stable over the years, has included individuals with a diverse set of backgrounds and skills, and a clear commitment to the mission of providing adults the opportunity and support to earn a high school diploma and begin post-secondary education while developing meaningful career paths. Additionally, two representatives of GICI have held non-voting, ex-officio seats on the board, allowing the two organizations to maintain a strong partnership as well as alignment on organizational goals and progress.

Directors on the board have been consistently engaged in the oversight of the Excel Center. Attendance has typically been high and meeting minutes have reflected thorough discussions revolving around a variety of school areas such as academics, finances, operations, human resources, technology, and community support. The board has been focused on the success of the school, but also on ensuring that the students attending the Excel Center received vital services and any necessary social supports they needed. Although directors have openly acknowledged the unique challenges that come with serving an adult population, they have maintained high expectations of school and student performance.

Regarding governance operations, the board has maintained compliance with its bylaws throughout the course of the charter with regular review of bylaws, director terms, and committee structures noted in meeting minutes. Meetings were held quarterly from 2010-2012 and have since moved to bi-monthly. Meetings have been held as scheduled, have consistently met quorum, and have abided by Indiana Open Door Law.

Due to consistent leadership and stewardship of the board of directors, the Excel Center receives a [Meeting Standard](#) for board governance.

3.4. Does the school’s board work to foster a school environment that is viable and effective?					
Indicator Targets	Does not meet standard	The school leader presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.			
	Approaching standard	The school leader presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.			
	Meets standard	The school leader complies with and presents no concerns in the sub-indicators below.			
	Exceeds standard	The school leader consistently and effectively complies with and presents no concerns in the sub-indicators below.			
Sub-indicators	Sub-indicators				
	Regular communication with school leadership and/or its management company				
	Annual utilization of a performance based evaluation to assess its own performance, that of the school leader, and management organization (if applicable)				
	Collaboration with the school leader to establish clear objectives, priorities, and goals				
	Interaction with school leader that is conducive to the success of the school, including requesting and disseminating information in a timely manner, providing continuous and constructive feedback, and engaging the school leader in school improvement plans				
3.2 Rating	2010-11	2011-12	2012-13	2013-14	Mid-Charter Rating
	Not Evaluated			MS	MS

2013-2014 was the first year this indicator was included in schools' accountability reports.

The Excel Center board held semi-monthly meetings in which many stakeholders, including representatives from GICI, the Executive Director, Regional Directors, and other relevant staff members, provided thorough reports on school performance. Between meetings, the Executive Director communicated with the COO for GEI and the board chair when necessary to provide leadership and support in school initiatives and events.

The GEI and Excel Center staffs created and managed rigorous priorities and goals for the schools. At each board meeting, they provided data to demonstrate the schools' progress towards achieving the goals and received feedback from the board. Additionally, the Executive Director met individually with the COO, board chair, and other board members throughout the year to receive more formal feedback and support. At the close of the school year, the COO provided a formal evaluation of the Executive Director, while the Executive Director evaluated the Regional Directors and each School Director. Currently, the board does not have a formal method of setting goals for itself or assessing its own performance, making it difficult to objectively gauge its own effectiveness at the end of the year.

In all observed meetings and interactions, the board, network, and school leadership teams appeared to have a positive and productive working relationship. The Executive Director and COO were self-reflective and proactive, allowing for relevant and transparent meetings that demonstrated a constant commitment to school improvement. For all of the reasons described above, the Excel Center receives a [Meeting Standard](#) for school and board environment.

3.5. Does the school comply with applicable laws, regulations, and provisions of the charter agreement relating to the safety and security of the facility?					
Indicator Targets	Does not meet standard		The school leader presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.		
	Approaching standard		The school leader presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.		
	Meets standard		The school leader complies with and presents no concerns in the sub-indicators below.		
Sub-indicators	Sub-indicators				
	Health and safety code requirements				
	Facility accessibility				
	Updated safety and emergency management plans				
	A facility that is well suited to meet the curricular and social needs of the students, faculty, and members of the community				
3.2 Rating	2010-11	2011-12	2012-13	2013-14	Mid-Charter Rating
	MS	MS	MS	MS	MS

From 2010-2014, the Excel Center facilities, including all individual campus buildings, met all the health and safety code requirements and provided a safe environment conducive to learning. The facilities design, size, maintenance, security, equipment, and furniture were all adequate to meet the schools' needs. The Mayor's Office monitoring of the Excel Center's compliance with health and safety code requirements did not reveal any significant concerns related to these obligations. Accordingly, it receives a [Meeting Standard](#) for this indicator.

Indicators included in the previous framework, but not assessed with the 2013-14 framework.

The following two indicators were included in the performance framework used for the 2010-2013 school years. While they are no longer included in the 2013-14 framework, the results of these indicators are important for a comprehensive review of performance between the years 2010-2014.

2.4. Is there a high level of parent satisfaction with the school?					
Indicator Targets	Does not meet standard	Less than 70% of parents surveyed indicate that they are satisfied overall with the school.			
	Approaching standard	More than 70% but less than 80% of parents surveyed indicate that they are satisfied overall with the school.			
	Meets standard	More than 80% but less than 90% of parents surveyed indicate that they are satisfied overall with the school.			
	Exceeds Standard	At least 90% of parents surveyed indicate that they are satisfied overall with the school.			
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	NA	NA	NA	NA	NA

Not applicable. The Excel Center does not administer parent satisfaction surveys as the school's student population is comprised of adult learners.

3.3. Has the school established and implemented a fair and appropriate pupil enrollment process?					
Indicator Targets	Does not meet standard	The school's enrollment process does not comply with applicable law AND/OR the school exhibits one or both of the following deficiencies: a) a substantial number of documented parent complaints suggest that it is not being implemented fairly or appropriately; b) the school has not engaged in outreach to students throughout the community.			
	Approaching standard	The school's enrollment process complies with applicable law but exhibits or both the following deficiencies: a) a substantial number of documented parent complaints suggest that it is not being implemented fairly or appropriately; b) the school has not engaged in outreach to students throughout the community.			
	Meets standard	The school's enrollment process complies with applicable law; there are minimal documented parent complaints suggesting that it is not being implemented fairly or appropriate; AND the school has engaged in outreach to students throughout the community.			
School Rating	2010-2011	2011-2012	2012-2013	2013-2014	Mid-Charter Rating
	MS	MS	MS	NA	MS

The admission and enrollment practices of the Excel Center have consistently met the requirements of Indiana’s charter school law. Each year, the Mayor’s Office collects the school’s enrollment policies and marketing procedures to ensure compliance with state law. The school employs a lottery system and gives preference to siblings of current students, as allowed by law. Between the 2010 and 2014 school years, the Mayor’s Office received no complaints from students around the school’s enrollment process. Accordingly, the Excel Center receives a Meeting Standard for this indicator.